

MAIN FACS

SELF-STUDY

Training Material

VENDOR PERFORMANCE

VENDOR PERFORMANCE FUNCTIONALITY	1
MENU NAVIGATION	2
5001 Vendor Maintenance/Inquiry Menu	2
5002 Vendor Performance/Inquiry Menu	3
5260 VENDOR PERFORMANCE	3
Deleting a Vendor Performance Document	6
Printing a Vendor Performance Document	6
5270 VENDOR PERFORMANCE DISPOSITION	6
Deleting a Vendor Performance Disposition Document	9
Printing a Vendor Performance Disposition Document	9
Resolution of a Vendor Performance Disposition Record	10
5280 VENDOR PERFORMANCE INQUIRY	11

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This Self-Study is to inform users of the Vendor Performance functionality. It provides screen prints and procedures for entering and/or inquiring on vendor performance and vendor performance disposition records in ADPICS. The Vendor Performance functionality includes two menus, and three vendor performance screens.

VENDOR PERFORMANCE FUNCTIONALITY

The purpose of the Vendor Performance functionality is to give ADPICS users a Statewide vendor performance reporting, disposition, and inquiry location. This functionality allows users to enter and track performance of vendors. Users can create a vendor performance record to report positive and/or negative performance of a specific vendor. Appropriate steps can then be taken, following Administrative Procedure, to investigate the complaint. During the investigation, the investigator (Department of Management and Budget-Acquisition Services (AS)) will enter a disposition record, which will indicate the steps being taken to resolve the issue. Once the issue is resolved, the investigator will record the outcome of the investigation and post the vendor performance disposition record. Users can inquire on vendor performance records to keep abreast of ongoing investigations, as well as to find out if a vendor has a history of complaints or exemplary performance.

The Vendor Maintenance/Inquiry Menu includes a Vendor Performance/Inquiry Menu selection. From the Vendor Performance/Inquiry Menu, users can select the three vendor performance screens: Vendor Performance, Vendor Performance Disposition, and Vendor Performance Inquiry.

MAIN FACS

SELF-STUDY

Training Material

MENU NAVIGATION

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PCHL5001 V4.1          ADVANCED PURCHASING/INVENTORY  MM/DD/YYYY  11:04 AM
LINK TO:                MAIN MENU

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        USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

        (1)  - ACCOUNTS PAYABLE MENU
        (2)  - PROCUREMENT TRANSACTIONS MENU
        (3)  - RECEIVING MENU

        (5)  - TABLE MAINTENANCE MENU
        (6)  - REPORT PROCESSING MENU
        (7)  - SYSTEMS MANAGEMENT MENU
        (8)  - CHANGE ORDER PROCESSING MENU

        (10) - DOCUMENT AUTHORIZATION MENU
        (11) - COMMODITY TABLE INQUIRY
        (12) - VENDOR MAINTENANCE/INQUIRY MENU
        (CL) - EXIT
```

Press <F12> to access the Vendor Maintenance/Inquiry Menu:

5001 Vendor Maintenance/Inquiry Menu

```
PCHL5001 V4.1          ADVANCED PURCHASING/INVENTORY  MM/DD/YYYY  11:04 AM
LINK TO:                VENDOR MAINTENANCE/INQUIRY MENU

                        COPYRIGHT 1993 KPMG PEAT MARWICK

        USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:

        (1)  - VENDOR TABLE INQUIRY
        (2)  - PAYABLE MAIL CODE INQUIRY
        (3)  - BIDDER VENDOR/MAIL CODE INQUIRY
        (4)  - BIDDER MAIL CODE INQUIRY
        (5)  - VENDOR CLASSIFICATION CODE TABLE MAINTENANCE
        (6)  - VENDOR STATUS CODE TABLE MAINTENANCE
        (7)  - VENDOR CLASS/STATUS CODE INQUIRY
        (8)  - VENDOR ADDRESS SUMMARY INQUIRY
        (9)  - VENDOR PERFORMANCE/INQUIRY MENU
        (10) - VENDOR NAME INQUIRY
        (11) - COMMODITY BY VENDOR
        (12) - VENDOR BY COMMODITY
        (CL) - EXIT
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MAIN FACS

SELF-STUDY

Training Material

Then press <F9> to access the Vendor Performance/Inquiry Menu.

5002 Vendor Performance/Inquiry Menu

PCHL5002 V4.1	ADVANCED PURCHASING/INVENTORY	MM/DD/YYYY	3:41 PM
LINK TO:	VENDOR PERFORMANCE/INQUIRY MENU		
COPYRIGHT 1993 KPMG PEAT MARWICK			
USE THE FUNCTION KEYS TO SELECT THE DESIRED FUNCTION:			
(1)	- VENDOR PERFORMANCE		
(2)	- VENDOR PERFORMANCE DISPOSITION		
(3)	- VENDOR PERFORMANCE INQUIRY		
(CL) - EXIT			

Note: Any user with security to create a requisition will be able to create a vendor performance record. As outlined in the procedures, contact with the vendor is to have occurred prior to creating a vendor performance record.

To establish a vendor performance record, select <F1> Vendor Performance:

5260 VENDOR PERFORMANCE

The examples that follow, show the vendor performance functionality. Note that data in this document is shown for training purposes only. The ID's, names and titles are fictitious. When creating vendor performance documents, use data that is valid in the Production region.

MAIN FACS

SELF-STUDY

Training Material

```
PCHL5260 V4.1          ADVANCED PURCHASING/INVENTORY  MM/DD/YYYY  8:15 AM
LINK TO:                VENDOR PERFORMANCE

PERF ID  :                ACTION IND:
VENDOR ID: 2123456789    001  JANITORIAL VENDOR
PERF CODE: EXS          EXCELLENT SERVICE
P/O ID   : 006NY000001
REF ID   :                DATE   :
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION  TIME   :
CONTACT  : FRANCIS SMITH                             PHONE: 517 335-5555
COMMENT  : (ISRT, DLET OR DUP) BLOCK
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY
        > WITH STAFF.  WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.
BLOCK >
        >
OF      >
        >
        >
        >
        >
        >
F1-HELP      F2-SELECT      F3-DELETE      F4-BLK FUNC  F5-NEXT
F7-PR BLK    F8-NX BLK      F9-LINK      F10-SAVE      F12-PRINT
G535 - FIELD SELECTED, PLEASE SELECT A FUNCTION KEY
```

- Enter the Vendor ID, or press <F2-SELECT> to access the 1200 Vendor Name Inquiry screen to select and return the vendor's ID
- Enter the vendor's Mail Code (blank field to the right of the Vendor ID), or press <F2-SELECT> to access the 5999 Table Lookup to select and return the appropriate mail code
- Enter a performance code in the PERF CODE field, or use <F2-SELECT> to access the 5999 Table Lookup to select and return the appropriate code, which will describe the performance issue
- Enter the associated purchase order, direct purchase order, or blanket purchase order ID, if there is one
- Enter an associated Reference ID (i.e., invoice, direct voucher, vendor's invoice number), if there is one
- Enter up to a 40-character performance description in the PERF DESC field
- Enter the contact person's name in the CONTACT field
- Enter the contact person's area code, telephone number and extension in the PHONE field

MAIN FACS

SELF-STUDY

Training Material

- Enter a description of the vendor's performance in the COMMENT text block area
- Press <F10-SAVE> to save the vendor performance record

PCHL5260 V4.1	ADVANCED PURCHASING/INVENTORY	MM/DD/YYYY	8:16 AM
LINK TO:	VENDOR PERFORMANCE		
PERF ID : 006YY000002 ACTION IND: N			
VENDOR ID: 2123456789 001 JANITORIAL VENDOR			
PERF CODE: EXS EXCELLENT SERVICE			
P/O ID : 006NY000001			
REF ID :			
DATE : MM/DD/YYYY			
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION TIME : 8:16 AM			
CONTACT : FRANCIS SMITH PHONE: 517 335-5555			
COMMENT : (ISRT, DLET OR DUP) BLOCK			
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY			
> WITH STAFF. WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.			
BLOCK >			
001 >			
OF >			
001 >			
>			
>			
>			
>			
F1-HELP	F2-SELECT	F3-DELETE	F4-BLK FUNC F5-NEXT
F7-PR BLK	F8-NX BLK	F9-LINK	F10-SAVE F12-PRINT
G001 - RECORD SAVED			

- The system will save the record, generate the Performance ID, and retrieve the Date and Time that the vendor performance record was created
- DO NOT POST THE VENDOR PERFORMANCE RECORD (When the associated vendor disposition record is posted, the vendor performance record will automatically be posted)
- Until the associated vendor performance disposition record is posted, additional information can be added to the vendor performance record, which will default to the vendor disposition record
- To inquire on an existing vendor performance record, enter the Performance ID in the PERF ID field, and press <ENTER> to inquire

MAIN FACS

SELF-STUDY

Training Material

Deleting a Vendor Performance Document

- To delete an unposted vendor performance record, access the 5260 Vendor Performance screen
- Enter the Performance ID and press <ENTER> to retrieve the record
- Press <F3-DELETE>, then press <F3-DELETE> again, to confirm the deletion of the performance record
- The associated vendor performance disposition record is also deleted

Note: Posted vendor performance records cannot be deleted.

Printing a Vendor Performance Document

For every vendor performance record created, agency personnel are to print the vendor performance document and mail it to the vendor. Printing a vendor performance document can be done from the 5260 Vendor Performance screen or the 5270 Vendor Performance Disposition screen (shown in the next section). The printed document is the same, regardless of which screen is used to perform the print function. The printed document will contain the combined performance and performance disposition information.

- To print a vendor performance document, press <F12-PRINT> while viewing the record that you wish to print

5270 VENDOR PERFORMANCE DISPOSITION

To access the 5270 Vendor Performance Disposition screen from the Main Menu, select <F12> 5001 Vendor Maintenance/Inquiry Menu. Then select <F9> 5002 Vendor Performance/Inquiry Menu. Then select <F2> 5270 Vendor Performance Disposition.

MAIN FACS

SELF-STUDY

Training Material

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PCHL5270 V4.1          ADVANCED PURCHASING/INVENTORY    MM/DD/YYYY    8:21 AM
LINK TO:                VENDOR PERFORMANCE DISPOSITION

PERF ID   : 006YY000002          ACTION IND:  N
VENDOR ID: 2123456789    001      JANITORIAL VENDOR
PERF CODE: EXS          EXCELLENT SERVICE
DISP CODE:
REF ID    :                  P/O ID: 006NY000001        DATE :
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION    TIME :
DISP BY   :                  PHONE:
COMMENT   : (ISRT, DLET OR DUP) BLOCK
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY
        > WITH STAFF.  WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.
BLOCK >
001    >
OF      >
001    >
        >
        >
        >
        >
F1-HELP      F2-SELECT      F3-DELETE      F4-BLK FUNC  F5-NEXT
F7-PR BLK    F8-NX BLK     F9-LINK      F10-SAVE     F12-PRINT
G014 - RECORD FOUND
```

Note: Only AS and other authorized users will be able to create a vendor performance disposition. Anyone with access to the 5270 screen will be able to perform inquiries.

- Enter the Performance ID of the associated vendor performance record, and press <ENTER> to retrieve the vendor performance disposition record

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PCHL5270 V4.1          ADVANCED PURCHASING/INVENTORY    MM/DD/YYYY    8:22 AM
LINK TO:                VENDOR PERFORMANCE DISPOSITION

PERF ID   : 006YY000002          ACTION IND:  N
VENDOR ID: 2123456789    001      JANITORIAL VENDOR
PERF CODE: EXS          EXCELLENT SERVICE
DISP CODE: GS          GOOD SERVICE SUBSTANTIATED
REF ID    :                  P/O ID: 006NY000001        DATE :
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION    TIME :
DISP BY   : SUSAN DAILEY        PHONE: 517 555-5555
COMMENT   : (ISRT, DLET OR DUP) BLOCK
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY
        > WITH STAFF.  WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.
BLOCK >
001    > SENT NOTE TO VENDOR.  WILL MONITOR PROGRESS FOR POTENTIAL EXTENSION OF
OF      > CONTRACT.
001    >
        >
        >
        >
        >
F1-HELP      F2-SELECT      F3-DELETE      F4-BLK FUNC  F5-NEXT
F7-PR BLK    F8-NX BLK     F9-LINK      F10-SAVE     F12-PRINT
G535 - FIELD SELECTED, PLEASE SELECT A FUNCTION KEY
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MAIN FACS

SELF-STUDY

Training Material

- The system retrieves the Vendor ID, Vendor Name, Performance Code, Reference ID, P/O ID, Performance Description, and Comment text from the 5260 Vendor Performance screen, based on the Performance ID entered
- Review the information
- Take the appropriate steps to resolve, following established procedures
- Once the action has been taken, enter a disposition code in the DISP CODE field, or use <F2-SELECT> to access the 5999 Table Lookup to select and return the appropriate code
- Enter your name in the DISP BY field
- Enter your area code, telephone number and extension in the PHONE field
- Enter a description of the performance disposition in the text block area (this can be entered on the existing text block, or on a new text block)
- Press <F10-SAVE> to save your vendor performance disposition record, and press <F10-SAVE> again to confirm the update

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PCHL5270 V4.1          ADVANCED PURCHASING/INVENTORY    MM/DD/YYYY    8:25 AM
LINK TO:                VENDOR PERFORMANCE DISPOSITION

PERF ID   : 006YY000002          ACTION IND: N
VENDOR ID: 2123456789   001      JANITORIAL VENDOR
PERF CODE: EXS          EXCELLENT SERVICE
DISP CODE: GS          GOOD SERVICE SUBSTANTIATED
REF ID    :                P/O ID: 006NY000001          DATE : MM/DD/YYYY
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION    TIME : 8:25 AM
DISP BY   : SUSAN DAILEY          PHONE: 517 555-5555
COMMENT   : (ISRT, DLET OR DUP) BLOCK
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY
        > WITH STAFF.  WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.
BLOCK >
001 > SENT NOTE TO VENDOR.  WILL MONITOR PROGRESS FOR POTENTIAL EXTENSION OF
OF > CONTRACT.
001 >
    >
    >
    >
    >
    >
F1-HELP    F2-SELECT    F3-DELETE    F4-BLK FUNC  F5-NEXT
F7-PR BLK  F8-NX BLK     F9-LINK     F10-SAVE    F12-PRINT
G082 - RECORD REPLACED
```


MAIN FACS

SELF-STUDY

Training Material

- The system will save the record, generate and retrieve the Date and Time that the vendor performance disposition record was created
- Additional information can be added, if necessary (some performance disposition records may require repeated action before the issue is resolved)
- **DO NOT POST THE VENDOR PERFORMANCE DISPOSITION RECORD UNTIL THE ISSUE IS RESOLVED**

Deleting a Vendor Performance Disposition Document

- Un-posted vendor performance disposition records are automatically deleted when the associated vendor performance is deleted (see previous section)
- To delete the vendor performance disposition information only, access the 5270 Vendor Performance Disposition screen
- Enter the Performance ID and press <ENTER> to retrieve the existing record
- Press <F3–DELETE>, then press <F3–DELETE> again, to confirm the deletion of the disposition information

Note: Posted vendor performance disposition records cannot be deleted.

Printing a Vendor Performance Disposition Document

Printing a vendor performance document can be done from the 5260 Vendor Performance screen (shown in the previous section) or the 5270 Vendor Performance Disposition screen. The printed document is the same, regardless of which screen is used to perform the print function. The printed document will contain the combined performance and performance disposition data.

- To print a vendor performance disposition document, press <F12–PRINT>, while viewing the record that you wish to print

MAIN FACS

SELF-STUDY

Training Material

Resolution of a Vendor Performance Disposition Record

To access the 5270 Vendor Performance Disposition screen from the Main Menu, select <F12> 5001 Vendor Maintenance/Inquiry Menu. Select <F9> to access the 5002 Vendor Performance/Inquiry Menu. Select <F2> 5270 Vendor Performance Disposition.

PCHL5270 V4.1	ADVANCED PURCHASING/INVENTORY	MM/DD/YYYY	8:29 AM
LINK TO:	VENDOR PERFORMANCE DISPOSITION		
PERF ID : 006YY000002	ACTION IND: P		
VENDOR ID: 2123456789 001	JANITORIAL VENDOR		
PERF CODE: EXS	EXCELLENT SERVICE		
DISP CODE: GS	GOOD SERVICE SUBSTANTIATED		
REF ID :	P/O ID: 006NY000001	DATE :	MM/DD/YYYY
PERF DESC: EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION	TIME :	8:25 AM	
DISP BY : SUSAN DAILEY	PHONE:	517 555-5555	
COMMENT : (ISRT, DLET OR DUP) BLOCK			
FUNCT > EMPLOYEES PLEASANT AND APPEAR TO ENJOY THEIR WORK, AND ARE FRIENDLY			
> WITH STAFF. WE ARE PLEASED WITH THE QUALITY OF THEIR WORK.			
BLOCK >			
001 > SENT NOTE TO VENDOR. WILL MONITOR PROGRESS FOR POTENTIAL EXTENSION OF			
OF > CONTRACT.			
001 >			
>			
>			
>			
>			
F1-HELP	F2-SELECT	F3-DELETE	F4-BLK FUNC F5-NEXT
F7-PR BLK	F8-NX BLK	F9-LINK	F10-SAVE F12-PRINT
VE34 - VENDOR PERFORMANCE RECORD POSTED			

- Enter the Performance ID of the associated vendor performance record, and press <ENTER> to retrieve the vendor performance disposition record
- Review the data, adding any additional comment text or changing the Disposition Code
- If changes were made, press <F10-SAVE> to save the updates
- Enter a 'P' in the ACTION IND field and press <F10-SAVE> to post the vendor performance disposition record
- Posting the vendor performance disposition automatically posts the associated vendor performance record

- **Once the vendor performance disposition is posted, no additional updates can be performed on the vendor performance record or the vendor performance disposition record**
- To print the vendor performance disposition, press <F12-PRINT>, while viewing the record that you wish to print

To access the 5280 Vendor Performance Inquiry screen from the Main Menu, select <F12> 5001 Vendor Maintenance/Inquiry Menu. Select <F9> to access the 5002 Vendor Performance/Inquiry Menu. Select <F3> 5280 Vendor Performance Inquiry.

Note: Any user authorized to access screen 5260, or 5270 will be able to access the 5280 also.

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- 11/30/04

PCHL5280 V4.1		ADVANCED PURCHASING/INVENTORY		MM/DD/YYYY	8:30 AM
LINK TO:		VENDOR PERFORMANCE INQUIRY			
VENDOR ID : 2123456789 001 JANITORIAL VENDOR					
S	PERF ID	PERF CODE	PERFORMANCE DESCRIPTION	DISP CODE	STATUS
S	006YY000002	EXS	EMPLOYEES ARRIVE EARLY/TIMELY COMPLETION	GS	POST
F1-HELP F5-NEXT F6-VW PERF					
G014 - RECORD FOUND		F8-NEXT PG F9-LINK		F11-VW DISP	

- To perform further inquiry, enter an 'S' in the Selection Column of the performance document you wish to view
- Pressing <F6–VW PERF> will access the 5260 Vendor Performance screen
- Pressing <F11–VW DISP> will access the 5270 Vendor Performance Disposition screen